DMV*MOVES*

Moving our region forward, together.

DMV*Moves* Survey 2024
Metropolitan Washington Council of Governments

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Agenda Item 3

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Background

The Metropolitan Washington Council of Governments (COG) and the Washington Metropolitan Area Transit Authority (WMATA) have launched DMV*Moves*, a new joint initiative to develop a unified vision for transit service in the region.

Goals

To support this initiative and inform the DMV*Moves* vision, conduct a survey of residents throughout the Washington Metropolitan area to understand what the region desires for acceptable and successful future public transportation.

Project Approach

- Designed and fielded an online and phone survey from June 24 to August 11, 2024.

- Developed a multi-mode outreach approach aimed at reaching as many respondents as possible across all jurisdictions:
  - Invitation letters and reminder postcards sent to 20,000 households, oversampling from areas with a higher proportion of residents who are Black, Indigenous, or People of Color (BIPOC) and of households with low incomes (below 200% of the federal poverty line)
  - In-person outreach, including at WMATA, MARC, VRE, and bus stations and at community events
  - Social media and digital outreach via COG and partner agencies
  - Opportunity to enter a drawing for one of ten $100 gift cards as an incentive to encourage participation

- Analyzed data received from 5,091 valid survey responses from across the region.

We received 5,091 valid survey responses from across the region:

- **Virginia (37%)**
  - Fairfax County (13%)
  - Arlington County (11%)
  - Prince William County (5%)
  - Alexandria City (4%)
- **Washington, D.C. (37%)**
- **Maryland (26%)**
  - Montgomery County (14%)
  - Prince George's County (7%)
  - Frederick County (2%)
  - Charles County (2%)
- Other (<1%)

To better understand needs across the region, we examine responses based on these subregions:
- **Core (51%)**
- **Inner suburbs (33%)**
- **Outer suburbs (11%)**
- **Outside COG area (4%)**
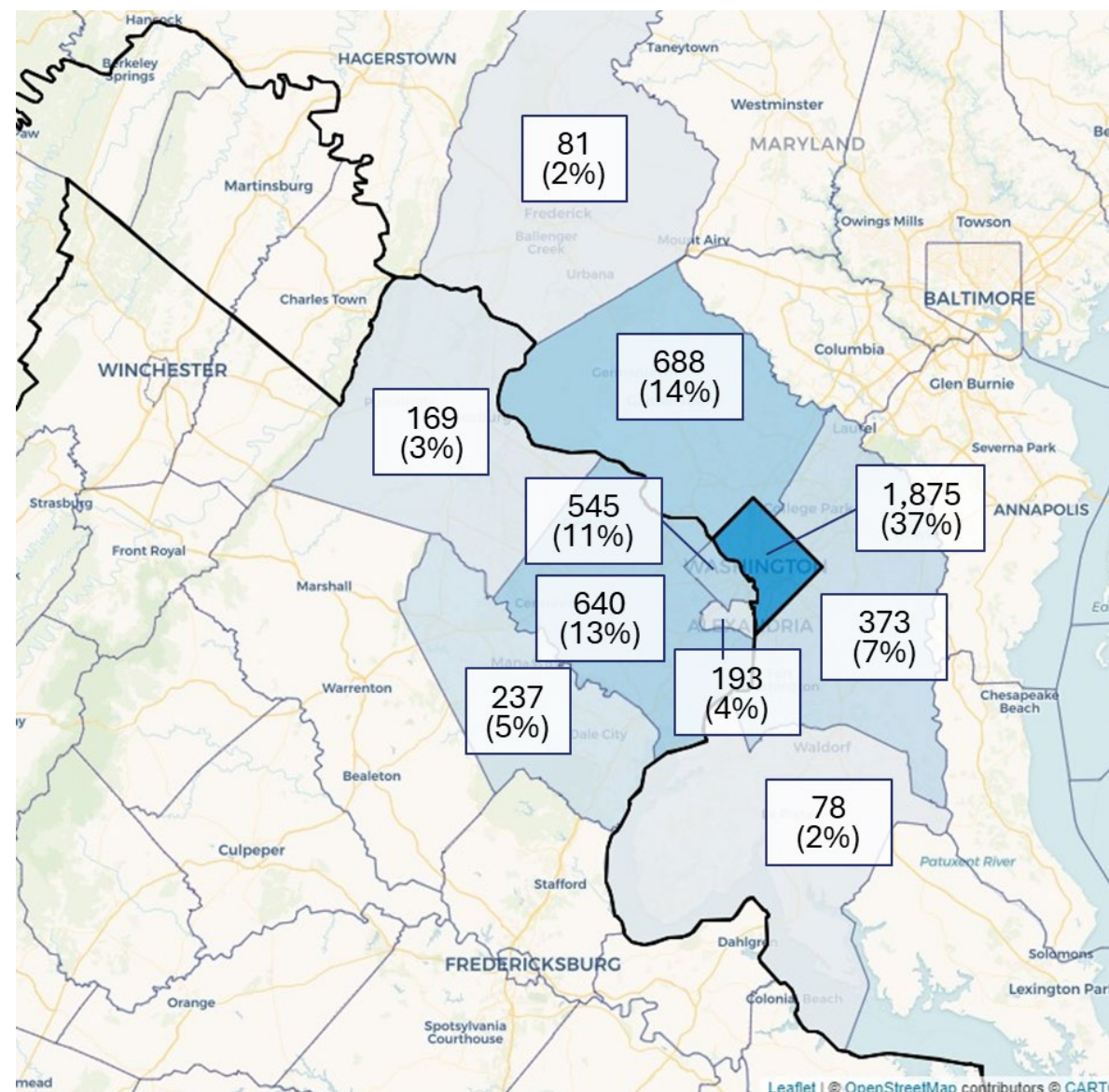
Number and percentage of survey responses by jurisdiction.

We heard from both riders and non-riders, with about 60% of respondents saying they usually ride public transit.

Most respondents use at least one mode of public transit, including Metrobus, Metrorail, local and commuter bus services such as ART, Ride On, Fairfax Connector, etc. and/or commuter rail such as MARC train, VRE etc.

- 63% use transit to commute to work/school
- 58% use transit for non-commute trips

Among those who usually commute using public transit, **34% ride at least one mode of public transit to work or school four or more days a week.**

Respondents who use at least one public transit mode:

Commute trips	63%
Non-commute trips	58%

Frequency of public transit use among riders:

■ 0-3 days a month   ■ 1-3 days a week   ■ 4 or more days a week

	0-3 days a month	1-3 days a week	4 or more days a week
Commute trips	17%	51%	34%
Non-commute trips	36%	47%	17%
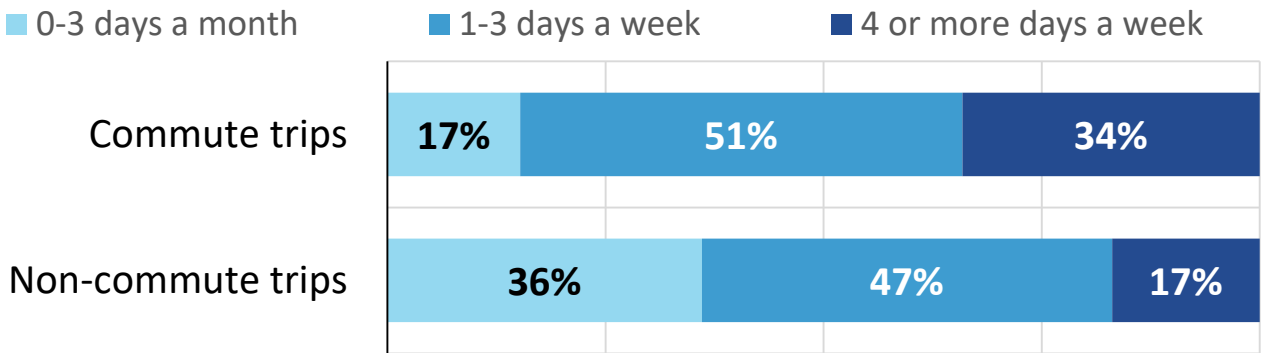
Survey respondents are broadly representative of the region's diversity.

50%
identify as women

2% identify as nonbinary, genderqueer, or gender non-conforming

10%
have a disability that impacts how they travel or use transit

7%
are students

35%
identify as BIPOC

8%
are younger than 24

15%
are older than 65

71%
are employed full-time

20%
earn household incomes less than $75k

39% earn $150k or more

18%
speak languages other than English at home, including Spanish (7%), French (3%), and Chinese (2%)

2.5
average household size

29%
live with people under the age of 18

21%
do *not* have a personal vehicle available for use

Key Findings: Familiarity with transit services and preferences

Across all regions, most respondents are familiar with Metrorail (90%). Many are also familiar with Metrobus (77%).
- Familiarity with Metrobus is highest in the core region and gradually declines among respondents who live further away.

Familiarity with other services varies across the region, roughly aligning with jurisdiction lines and service areas, and is lower overall.
- 53% are familiar with county buses (ART, Ride On, Fairfax Connector, etc.)
- 45% are familiar with MARC
- 36% are familiar with VRE

Only 2% of respondents said they were not familiar with any of the above services.

74% of respondents do not consider who the transit service provider is when deciding whether to ride public transit.
- When they do choose a particular service provider, **reliability** is the top reason motivating this choice.
- **Safety** and **familiarity** are also common considerations.

Hybrid arrangements for work and school are common.

More respondents say they commute to work or school Tuesdays-Thursdays and work or attend school remotely on Mondays and Fridays.

What days of the week do you typically…

… commute to work/school?

Day	%
Monday	49%
Tuesday	62%
Wednesday	63%
Thursday	59%
Friday	41%
Saturday	8%
Sunday	5%
It varies	14%
I do not commute to work/school	%

… work/attend school from home or another location?

Day	%
Monday	36%
Tuesday	26%
Wednesday	27%
Thursday	29%
Friday	46%
Saturday	10%
Sunday	7%
It varies	18%
I do not work or attend school from home	19%

- Only 10% say they never commute to work/school.

- About 19% never work or attend school from home.

- Notably, 14-18% say their commute and remote work/school arrangements vary.

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When commuting, nearly half (48%) use Metrorail, while 42% drive alone in a private vehicle.

About a quarter (26%) also use Metrobus. Other transit services are used less often.

How do you usually travel <u>to work/school</u>? Please select all that apply.

Mode	Percentage
Metrorail	48%
Drive alone in a private vehicle	42%
Metrobus	26%
Walk or roll (using a wheelchair or other mobility device)	20%
Bike	18%
Local and commuter bus services (ART, Ride On, etc.)	16%
Commuter rail services (MARC, VRE, etc.)	9%
Ridehail (Uber, Lyft, etc.)	9%
Carpool in a private vehicle	6%
Taxi	4%
Motorcycle, moped, or scooter	3%
MetroAccess or Dial-A-Ride	2%
Vanpool	1%
Other (Please tell us more)	3%

- 58% say they use more than one mode of transportation for commute trips.

Among those who selected "Other," common write-in responses include work and school shuttles.

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For commute trips, Metrorail, Metrobus, and local and commuter bus services are used more frequently than commuter rail services.

How often do you typically use the following services when you commute to or from work/school?

Legend:
- Never
- 1 day a month or less
- 2-3 days a month
- 1 day a week
- 2 days a week
- 3 days a week
- 4 days a week
- 5 or more days a week

Local and commuter bus services
1% | 6% | 14% | 12% | 19% | 20% | 10% | 19%

Metrobus
1% | 5% | 17% | 10% | 17% | 18% | 11% | 21%

Commuter rail services
3% | 10% | 20% | 10% | 20% | 18% | 8% | 11%

Metrorail
<1% | 3% | 13% | 10% | 19% | 22% | 12% | 21%
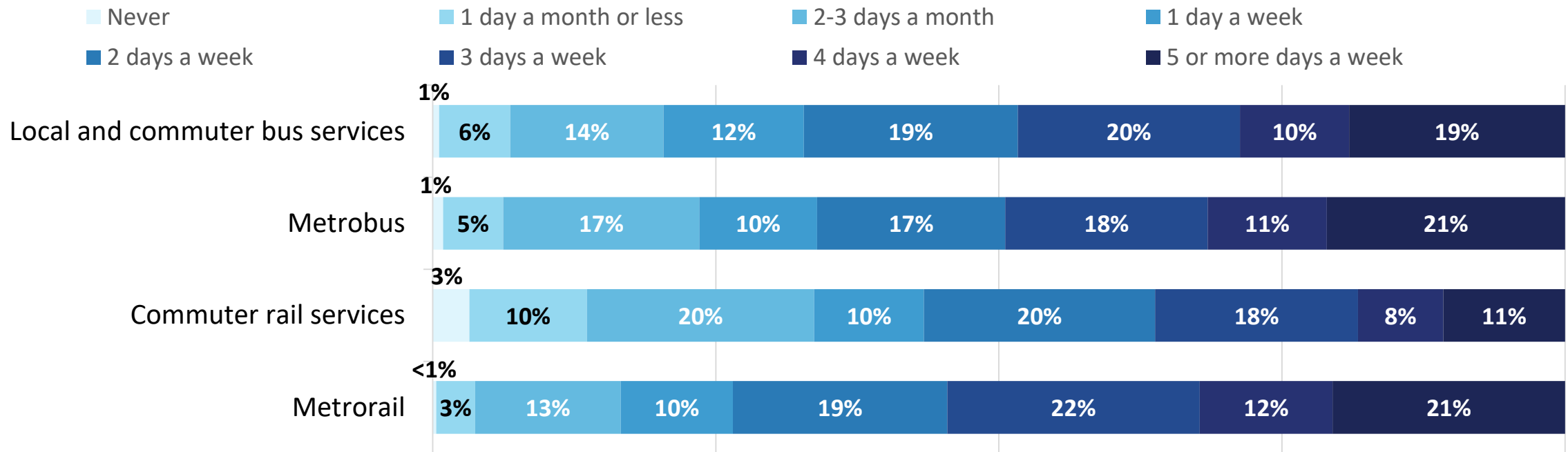
Each of the questions shown in the chart above were only shown to respondents who selected the given travel mode in the previous question, "How do you usually travel to work/school?".

Commuters report challenges with service frequency and distance to/from stops on both bus and rail transit.

Service frequency, number of stops/transfers, and real-time info are more common issues with bus transit than with rail transit.

Challenges that make trips to work/school difficult when using:

	Bus transit	Rail transit
Service is not frequent enough	43%	26%
Stops are too far away from my home	20%	29%
Too many stops/transfers	30%	16%
Stops are too far away from my workplace/school	16%	24%
Difficult to get real-time information on arrival/departure times	23%	13%
Personal safety concerns (assault, theft, etc.)	14%	16%
Fares are too expensive	10%	16%
I need to use my personal vehicle during the day	11%	12%
Parking provided by work/school	4%	8%
Vehicle safety concerns (crash, injury while onboard, etc.)	5%	6%
Other (Please tell us more)	14%	13%
I do not experience any challenges riding bus/rail transit to work/school	11%	15%

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Key Findings: Commute trips

Nearly half (48%) use Metrorail when commuting, followed closely by driving a private vehicle (42%). Some also report using Metrobus (26%). Other transit services are used less often.
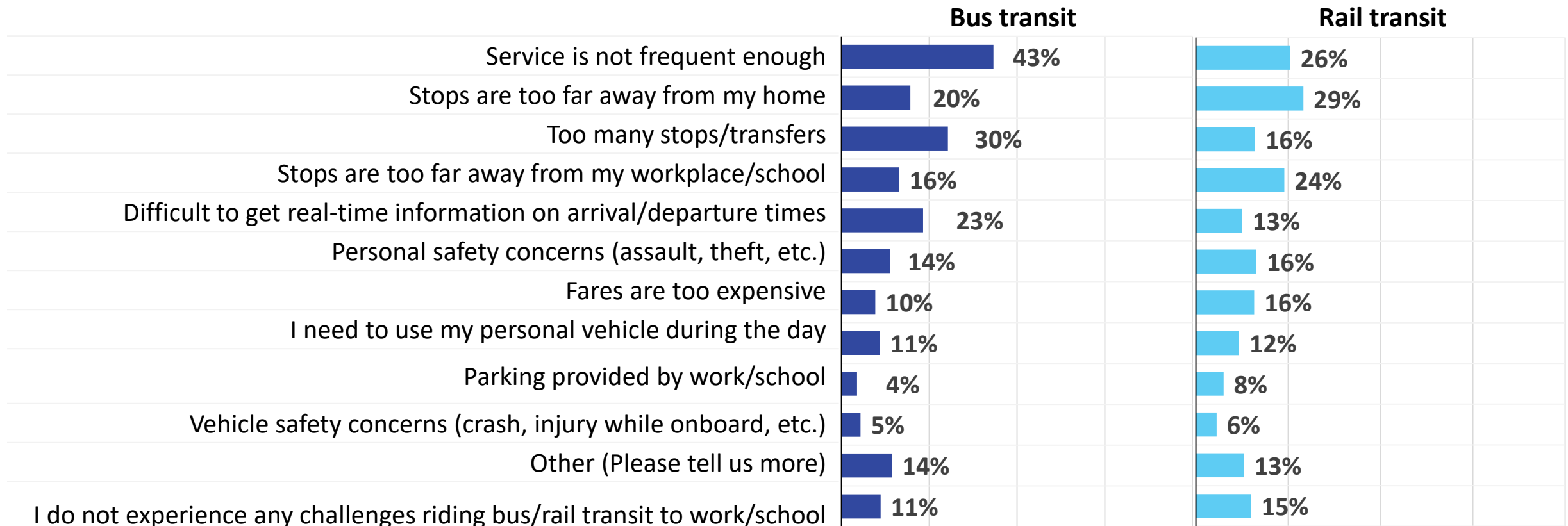
- 58% said they use more than one mode for commute trips.

Metrorail, Metrobus, and local and commuter bus services are used most frequently for commute trips.

- More than 50% ride these services three days a week or more. About 20% ride these services five days a week or more.
- Only 11% ride commuter rail services (such as MARC or VRE) five days a week or more.

Bus and rail transit pose similar challenges for commuters, including service frequency and distance to/from stops.

- More report challenges with service frequency, stops/transfers, and insufficient real-time info when using bus transit.

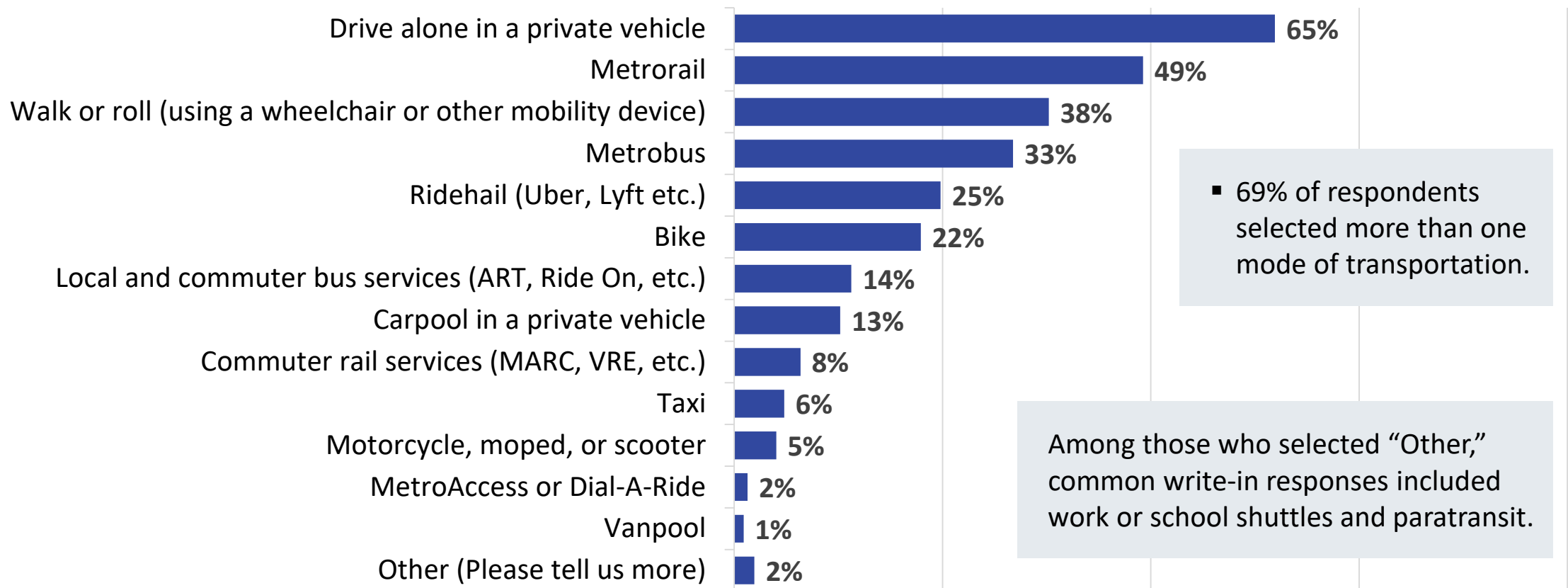**Hybrid arrangements for work and school are common.**

- Many **commute Tuesdays-Thursdays** and work or attend school remotely on Mondays and Fridays.
- Notably, at least 14% say their **commute and remote work or school arrangements vary**.
- **Few work fully remotely** – only 10% say they never commute to work or school.
- **Some commute almost every day**. About 19% never work or attend school from home.

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Driving is the most common mode (65%) for non-commute trips.
Followed by Metrorail (49%), walking/rolling (38%), and Metrobus (33%).

How do you usually travel <u>for trips other than work/school</u>? Please select all that apply.

Mode	Percentage
Drive alone in a private vehicle	65%
Metrorail	49%
Walk or roll (using a wheelchair or other mobility device)	38%
Metrobus	33%
Ridehail (Uber, Lyft etc.)	25%
Bike	22%
Local and commuter bus services (ART, Ride On, etc.)	14%
Carpool in a private vehicle	13%
Commuter rail services (MARC, VRE, etc.)	8%
Taxi	6%
Motorcycle, moped, or scooter	5%
MetroAccess or Dial-A-Ride	2%
Vanpool	1%
Other (Please tell us more)	2%

- 69% of respondents selected more than one mode of transportation.

Among those who selected "Other," common write-in responses included work or school shuttles and paratransit.
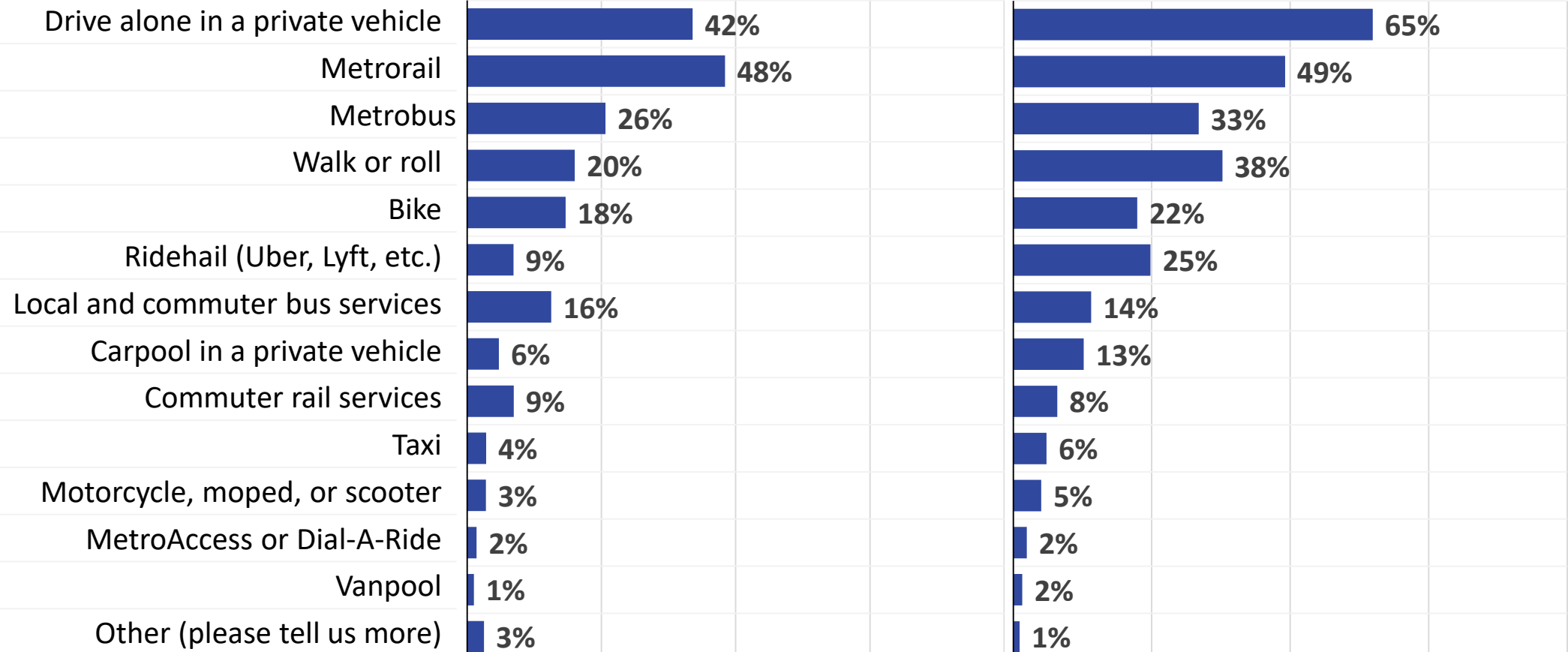
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More respondents say they drive, walk, carpool, or use a ride-hail service for non-commute trips than for commute trips.

Public transit services are used at similar rates for commute and non-commute trips.

How do you usually travel…

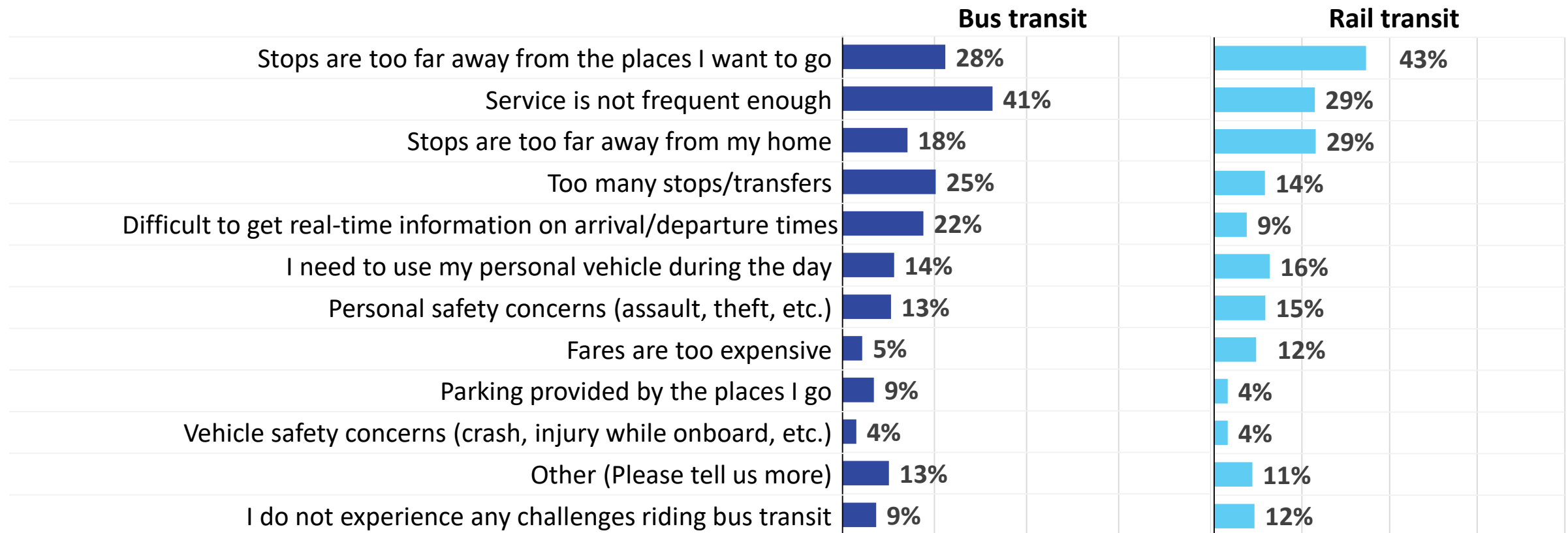|	… to **work/school**?	… for **trips other than work/school**?
Drive alone in a private vehicle	42%	65%
Metrorail	48%	49%
Metrobus	26%	33%
Walk or roll	20%	38%
Bike	18%	22%
Ridehail (Uber, Lyft, etc.)	9%	25%
Local and commuter bus services	16%	14%
Carpool in a private vehicle	6%	13%
Commuter rail services	9%	8%
Taxi	4%	6%
Motorcycle, moped, or scooter	3%	5%
MetroAccess or Dial-A-Ride	2%	2%
Vanpool	1%	2%
Other (please tell us more)	3%	1%

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Service frequency and distance to/from stops are the most common difficulties for non-commute trips using both bus and rail transit.

Difficulties with service frequency and real-time info are reported more often with <u>bus transit</u>, while distance to/from stations is reported more often with <u>rail transit</u>.

Challenges that make <u>non-commute trips</u> difficult when using:

	Bus transit	Rail transit
Stops are too far away from the places I want to go	28%	43%
Service is not frequent enough	41%	29%
Stops are too far away from my home	18%	29%
Too many stops/transfers	25%	14%
Difficult to get real-time information on arrival/departure times	22%	9%
I need to use my personal vehicle during the day	14%	16%
Personal safety concerns (assault, theft, etc.)	13%	15%
Fares are too expensive	5%	12%
Parking provided by the places I go	9%	4%
Vehicle safety concerns (crash, injury while onboard, etc.)	4%	4%
Other (Please tell us more)	13%	11%
I do not experience any challenges riding bus transit	9%	12%

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Key Findings: Non-commute trips

Metrorail, Metrobus, and local and commuter bus services are used more frequently for non-commute trips than commuter rail services (such as MARC or VRE).
- More than 75% ride these services 2-3 days a month or more. About 25% ride these services three days a week or more.
- In contrast, only 58% ride commuter rail more than once a month.

For non-commute trips, frequency of service and distance to/from stops are the most common difficulties for both bus and rail transit.
- More report challenges with service frequency and getting real-time information when using bus transit.
- Challenges with distance to/from stations are more commonly reported for rail transit.

Driving alone in a private vehicle is the most common (65%) non-commute trip mode.
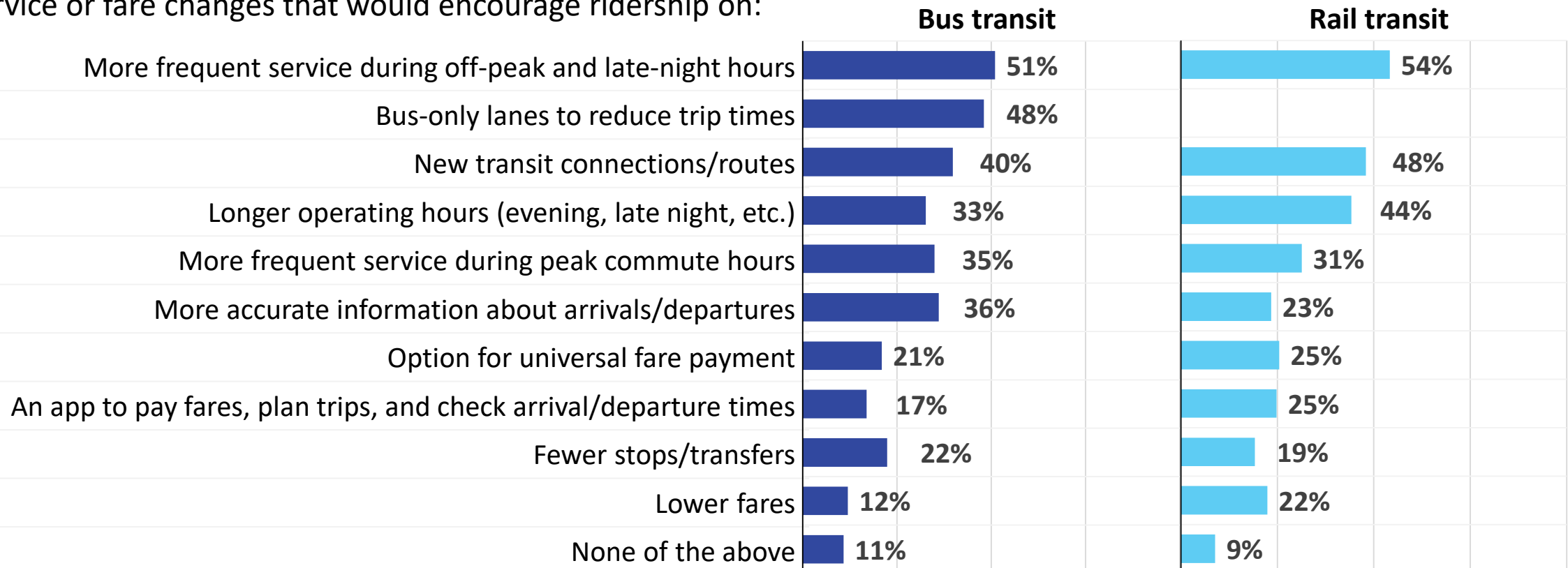- Many also use Metrorail (49%), followed by walking/rolling (38%) and Metrobus (33%).
- More respondents said they drive, walk, carpool, or use a ride-hail service for non-commute trips than for commute trips.
- 69% of respondents use more than one mode of transportation.

More frequent service (including off-peak and late-night), dedicated bus lanes, and new transit connections/routes are popular fare and service changes that would encourage ridership.

Many also request longer operating hours and more accurate arrival/departure information.

Service or fare changes that would encourage ridership on:

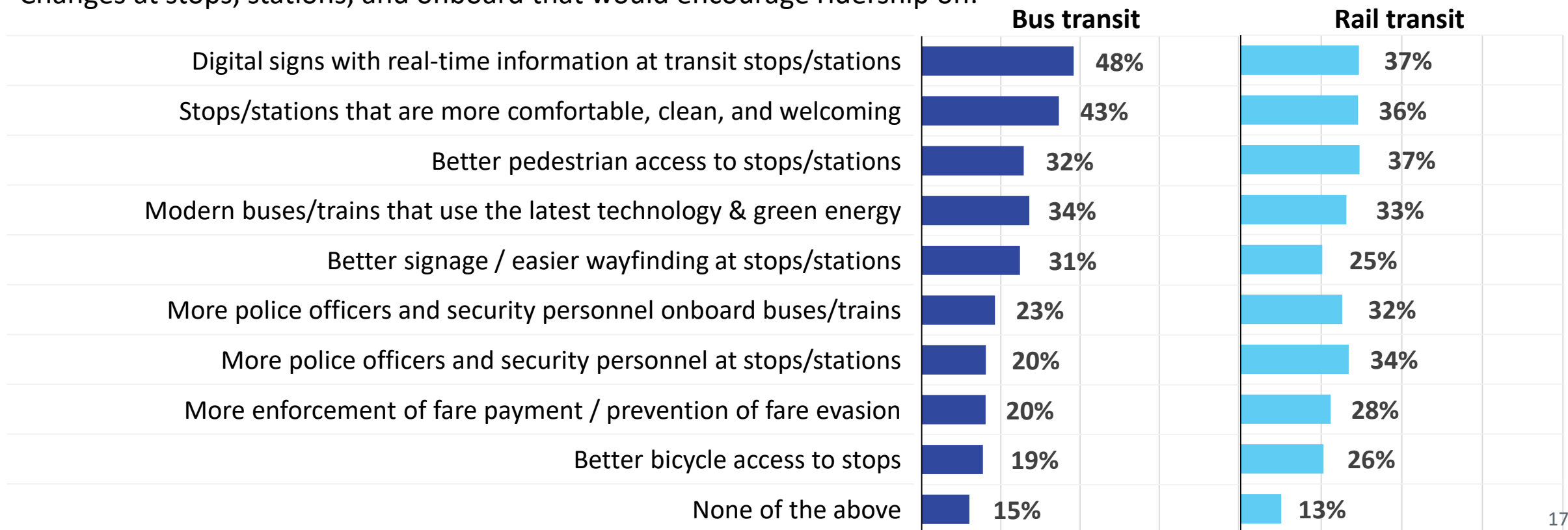|	Bus transit	Rail transit
More frequent service during off-peak and late-night hours	51%	54%
Bus-only lanes to reduce trip times	48%	
New transit connections/routes	40%	48%
Longer operating hours (evening, late night, etc.)	33%	44%
More frequent service during peak commute hours	35%	31%
More accurate information about arrivals/departures	36%	23%
Option for universal fare payment	21%	25%
An app to pay fares, plan trips, and check arrival/departure times	17%	25%
Fewer stops/transfers	22%	19%
Lower fares	12%	22%
None of the above	11%	9%

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Digital signs with real-time info, improved comfort and cleanliness, and better pedestrian access would encourage ridership.

Many also say more police officers and security personnel at stations and onboard would encourage ridership, especially on rail transit.

Changes at stops, stations, and onboard that would encourage ridership on:

	Bus transit	Rail transit
Digital signs with real-time information at transit stops/stations	48%	37%
Stops/stations that are more comfortable, clean, and welcoming	43%	36%
Better pedestrian access to stops/stations	32%	37%
Modern buses/trains that use the latest technology & green energy	34%	33%
Better signage / easier wayfinding at stops/stations	31%	25%
More police officers and security personnel onboard buses/trains	23%	32%
More police officers and security personnel at stops/stations	20%	34%
More enforcement of fare payment / prevention of fare evasion	20%	28%
Better bicycle access to stops	19%	26%
None of the above	15%	13%

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Key Findings: Opportunities to increase ridership

When asked what service changes would encourage ridership, more than half chose more frequent off-peak and late-night service.
Other top answers include:
- New transit connections/routes
- More accurate information about arrivals/departures
- More frequent service during peak commute hours
- Longer operating hours
- Bus-only lanes to reduce trip times

When asked what changes at stops, stations, and onboard would encourage ridership, all proposed changes were popular, but the following stood out as most popular:
- Digital signs with real time information
- Stops/stations that are more comfortable, clean, and welcoming
- Better pedestrian access to stops/stations
- Modern buses/trains that use the latest technology and green energy
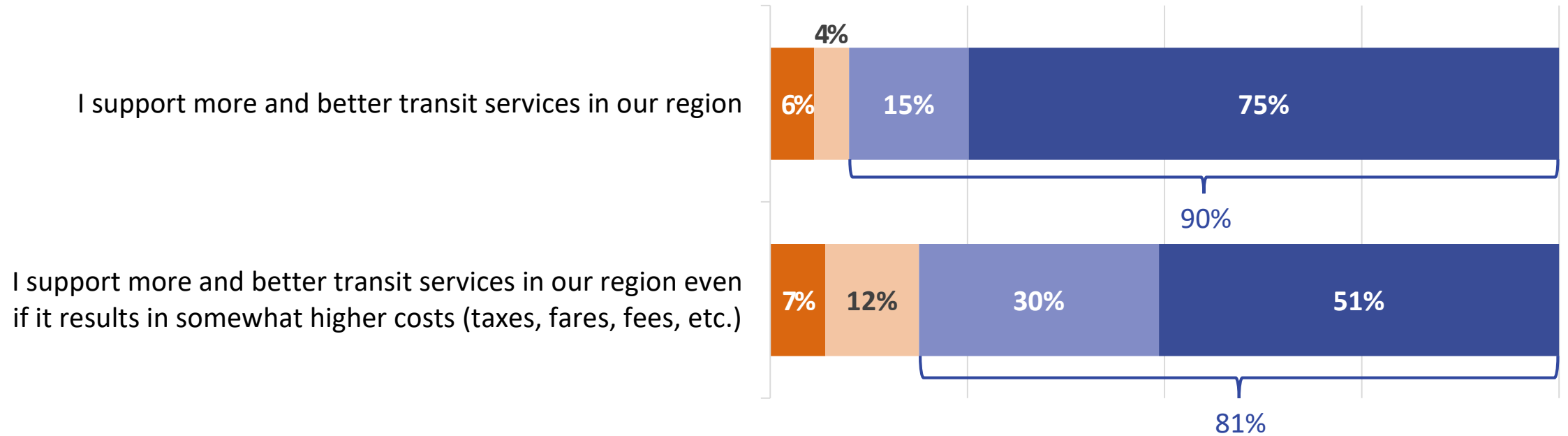
- In the core region and inner suburbs, respondents tended to mention **frequency of service** as a top priority.

- In outer areas, respondents were more concerned with **distance to and from stops**.

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Most respondents support more and better transit in the region, even if it results in higher costs.

To what extent do you agree or disagree with the following statements?

- Strongly disagree
- Somewhat disagree
- Somewhat agree
- Strongly agree

Statement	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree	Total agree
I support more and better transit services in our region	6%	4%	15%	75%	90%
I support more and better transit services in our region even if it results in somewhat higher costs (taxes, fares, fees, etc.)	7%	12%	30%	51%	81%

Support for investment options varies, with many preferring tolling, taxes, or vehicle fees over increased fares.

Which of these investments do you support?
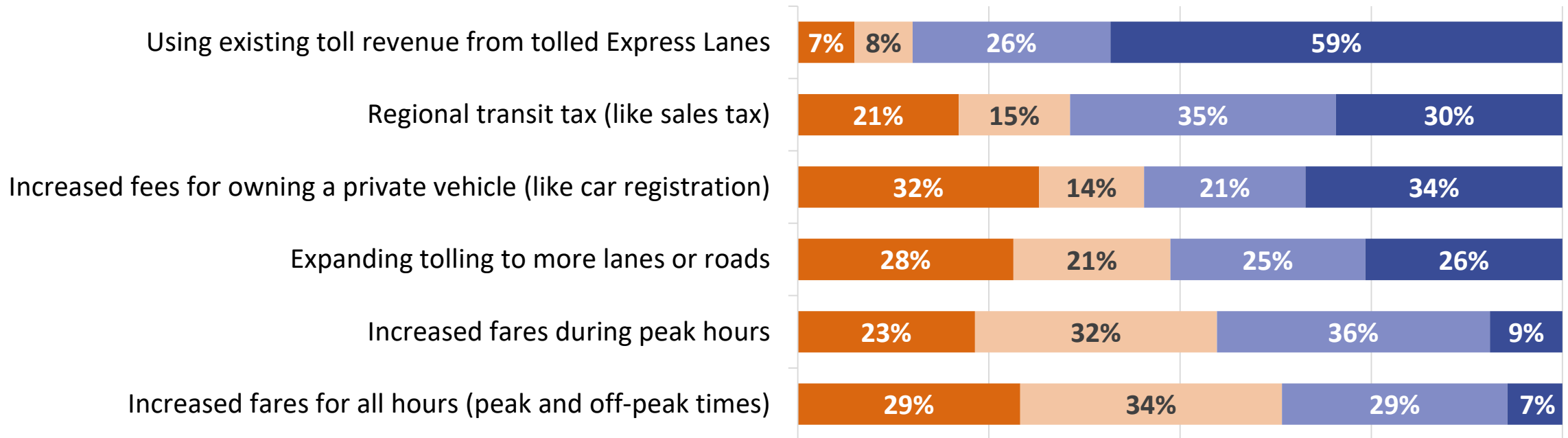
■ Strongly oppose ■ Somewhat oppose ■ Somewhat support ■ Strongly support

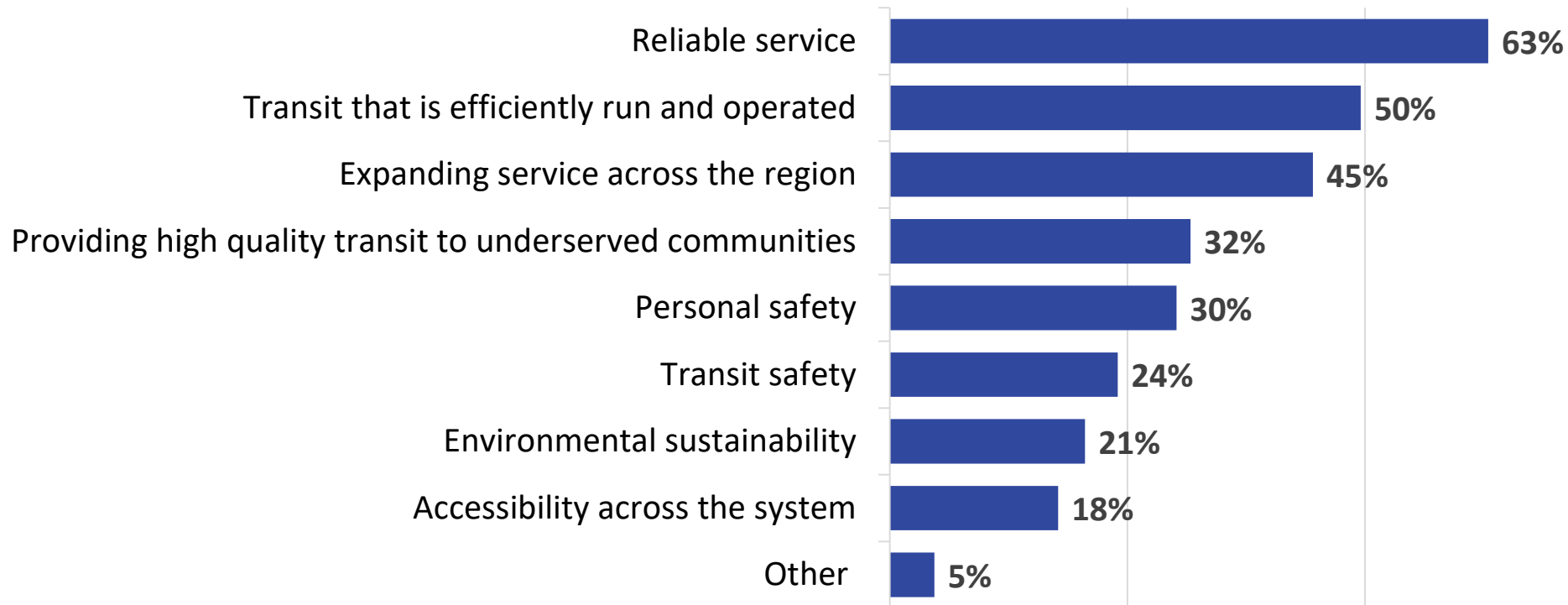|	Strongly oppose	Somewhat oppose	Somewhat support	Strongly support
Using existing toll revenue from tolled Express Lanes	7%	8%	26%	59%
Regional transit tax (like sales tax)	21%	15%	35%	30%
Increased fees for owning a private vehicle (like car registration)	32%	14%	21%	34%
Expanding tolling to more lanes or roads	28%	21%	25%	26%
Increased fares during peak hours	23%	32%	36%	9%
Increased fares for all hours (peak and off-peak times)	29%	34%	29%	7%

Note: for simplicity, the above chart does not include respondents who selected "Don't know"

Top future funding priorities are reliable service, efficiently run and operated transit, and expanded service across the region.

Which of the following should leaders prioritize when planning for and funding transit services in our region? Please select your top (3) priorities.

Priority	Percentage
Reliable service	63%
Transit that is efficiently run and operated	50%
Expanding service across the region	45%
Providing high quality transit to underserved communities	32%
Personal safety	30%
Transit safety	24%
Environmental sustainability	21%
Accessibility across the system	18%
Other	5%

Key Findings: Future investments

Support for investment options vary, with many expressing support for tolling, taxes, and vehicle fees to support transit.
- Existing revenue from tolled Express Lanes (85%)
- A regional transit tax (65%)
- Increased fees for private vehicles (55%)
- Expanding tolling to more lanes or roads (51%)

Support is lowest for increased fares, with slightly more support for increased fares during peak hours (45%) than for all hours (36%).

When planning for and funding transit services in our region, leaders should prioritize:
- Reliable service (63%)
- Efficiently operated transit (50%)
- Expanded service across the region (45%)

Most respondents support more and better transit in the region, even if it results in higher costs.
- 90% support more and better transit services in the region.
- 81% support more and better transit services in the region even if it results in somewhat higher costs (taxes, fares, fees, etc.).

Key Takeaways from the Survey

- **Public transit services in the DMV region are not only familiar but frequently used, especially for Metrorail and Metrobus.**
- **Metrorail, Metrobus, and local and commuter rail and bus services are used more frequently for commute trips.**
- **Service frequency and distance to/from stops pose challenges for both commuters and non-commuters.**
- **More than half of respondents indicated more frequent off-peak and late-night service would encourage ridership.**
- **Most respondents support more and better transit services in the region, even if it results in higher costs.**
- **When planning for and funding transit services, DMV leaders should prioritize reliable service, efficiently operated transit, and expanded service across the region.**